

Dates to Remember

June 11th Council Meeting – Exec Board Meeting [7:00 pm]

The following are due at this meeting:

- Two copies of the Unit Annual Report (if not previously submitted)
- Two copies of the 2012-2013 Board Roster (if not previously submitted)
- Per caps received since last council meeting

June 21st – 24th National PTA Convention, San Jose, CA



Fremont Council President’s Message by Melinda Kufeld

It’s June! Summer is nearly here and a much deserved break from the hectic pace of the school year. Those with school aged children are so busy and many people believe they cannot possibly do another thing in their lives. Thank goodness for you! You were willing to share your time, talents, passion to make a difference the lives of the youth and families in your community. **Thank you!**

You may never know the full reach of your dedication to PTA and the many ways your PTA’s programs and events have enriched, and in some cases changed, the lives of so many people. Our “children” are now 19 and 23 and they still talk about many of the PTA programs and events they attended while at Parkmont to include a few silly arguments over who *REALLY* did get more candy and raffle tickets at the Halloween Carnivals. The pioneer living assembly is a source of reference for our son who is a program director at a camp in SoCal where he has worked since college graduation. He refined the content their “California Trail” science camp program and added elements he learned about during the assembly. The next addition is a gold panning station that he too remembers from the assembly. The reach of that assembly Parkmont PTA funded fifteen or so years ago continues today with a new generation of young people. Never doubt that the lack of free time and sleep, the long hours planning events, days spent at the school sometimes leaving sweating and utterly exhausted were worth it. It was!

Thank you to soon to be past PTA presidents! You’ve done it, *thank you!*

To those who have another year as president, *thank you!* Take time to reflect on this year and a bit of a break to recharge, then consider how you’ll apply the year’s experience to refine and shape your PTA’s service to your community.

Incoming presidents, *thank you* for saying yes! You have quite a experience ahead of you and Fremont Council PTA is here to support you. Let us know if we can answer a question (or 20 of them) and how we can lend a hand. Do take the time to read your bylaws, look through the Toolkit, check out CA State PTA and Fremont Council’s websites, meet with the out-going president and the principal if you’ve yet to do so, talk with your board, chairpersons and community members. Knowledge is powerful and will make your PTA year easier and more rewarding as does starting to plan now/soon – the new school year will be here before we know it...

Unfortunately, I will miss our June 11th meeting as I’ll be out of town. Our 1st VP of leadership, Meryl Shatzman, will preside over the meeting.

Enjoy your summer! **Thank you for ALL you do!**

Melinda – melinda.kufeld@sbcglobal.net or 510.468.0780

*President can be substituted for any other PTA position!

Inside This Issue:

What’s due this month	1
President’s Message	1
Contact Information	2
Great Programs	2
Parliamentarian Corner	2
The Leader Link	3
Laying a Foundation for a Successful Year	4-5
Auditor	5
Finance	6
Membership	7
Mission Statement and Goals	7
Records Retention	8

Please take a look at the Peralta District PTA Newscaster. There is a ton of great info included.

<http://www.peraltadistrictpta.org/newsletters.php>

Council Officers and Chairs 2011 – 2012

Feel free to contact any of the Fremont Council Executive Board for information, assistance and/or support.

President	Melinda Kufeld	melinda.kufeld@sbcglobal.net	(510) 468-0780
1st VP Leadership	Meryl Shatzman	merylshatzman@yahoo.com	(510) 697-7656
2nd VP Programs	OPEN		
Secretary	Nancy Mitchell	nancym@mac.com	(510) 657-2912
Treasurer	Kim Mathis	oemexp@att.net	(510) 770-1297
Financial Secretary	Barbara Bousquet	h20swimbarb@gmail.com	(510) 557-7640
Auditor	Sridevi Ganti	sridevi_ganti@hotmail.com	(510) 742-1936
Historian	Cindy Baglietto		(510) 484-4031
Parliamentarian	Lisa Ogrey	logrey@pacbell.net	(510) 713-8542
Legislation Chair	Ann Crosbie	crosbieclan@gmail.com	(510) 713-2119
Reflections	Becky Bruno	bbruno4921@gmail.com	(510) 661-0117
Membership	Beena Ammanath	neilseansmom@gmail.com	(415) 238-6123
Newsletter Editor	Julie Hale	penguinfantoo@comcast.net	(510) 494-0706
School Board Liaison	OPEN		
Diversity	OPEN		
Hospitality	Leslie Gupta	lk Gupta@comcast.net	(510) 818-9551
Robertson's Liaison	Aimee Hubacek	Hubacek6@comcast.net	(510) 656-1261
Health & Safety	Dianne Jones	robndianne@sbcglobal.net	(510) 713-9391
Webmaster	Jenny Mitchell	jenstechs@mac.com	

Parliamentarian Corner by Lisa Ogrey

What do I do when I receive my signed Bylaws back?

After the California State PTA Parliamentarian has approved and signed your amended bylaws, the process of adoption must be completed. In order to adopt your amended bylaws, the approval must be made by the **Association** with **two-thirds (2/3)** vote and a written notice of the meeting must be given at least **30 days prior** to the date of the meeting. The notice should contain the place, date and time of the meeting, and the general nature of the business that the board, at the time of the notice, intends to present for action by the members. Bylaws are then signed and dated by your unit's secretary after they have been successfully adopted by the association. The original signed bylaws should be kept in both the secretary's binder and the president's binder.

Looking ahead to next year; it is very important that at your summer planning meeting, each board member be given a copy of your unit's current bylaws. I can't stress enough the importance of them reading this document and making themselves familiar with the material. Each board position and what is expected is outlined within.

On a personal note, I just wanted to take this opportunity to thank all the unit presidents and parliamentarians that I worked with this year. It was very gratifying to be able to assist such an enthusiastic group of individuals toward a common goal; updating your bylaws and basic parliamentary procedure. Job well done everyone!

Until next time!

Lisa Ogrey

Fremont Council PTA's School Board Liaison

logrey@pacbell.net

Great Programs Abound in Fremont!

Thank you for all of the wonderful programs you bring to Fremont! Meryl and I loved reading about them while reviewing the mid year and year end unit reports. We were amazed about the number of creative ways Fremont PTAs serve their communities.

We are in the process of collecting details about many of the programs which will be available sometime this summer. Stay tuned for details... by Melinda



The Leader Link by Meryl Shatzman



Summer Activity Checklist

- Confirm with the principal when PTA information needs to be available for the school's Welcome Back Packets.
- Hold a meeting of the executive committee to go over the plans, schedule and budget that will be presented to the general membership for next year.
- Plan membership campaign activities, recruit volunteers to help at your Welcome Back/Maze Day tables
- Download the membership cards template (contact Leslie Gupta) and print out your PTA Unit name, Unit ID# and dates.
- Look for and share mailings from national, state, district and council with your board.
- Prepare an article for your newsletter and Welcome Back Packet.

Summer PTA Planning

Most students {and parents} are counting down the few days left in the academic year. Warmer weather, less scheduled days, vacation time and all around laid-back attitudes abound. But wait, this is the time of year to keep your head in the game! This is the time to get some serious planning done for next year! {eeek!} Trust me, do it now and you'll have a much more enjoyable school year!

One of the last things that the PTA does before the school year is out is induct the incoming PTA board. This new board has to spend the summer learning all of the tasks that come along with their new title on the board. The planning sessions will be long over the summer since the board meetings are more than likely the only time that your PTA board will be able to get together to brainstorm.

The first summer PTA board meeting should include not only the incoming board members but also the members leaving the board. This is what I like to call a meeting of the minds. The outgoing board member can help the new board member taking over that position by going over how they handled certain tasks and what things they think need to change or things that they wanted to accomplish but weren't able to for whatever reason. This is such an important meeting. The passing of the PTA torch is more than just announcing who the new board members will be, it is teaching those new board members what being on the PTA is all about. You have to pass on any information that you have from prior years so they understand what has been done in the past so they can adequately plan for the upcoming school year.

During this meeting of the minds it is a good time for the new PTA President to stand up and tell everyone what he or she hopes to accomplish during the upcoming school year. The new board needs to set at least one goal for the school year during this first meeting. The President can throw out a few ideas for the year's goals with his or her own goals for the PTA for the year. These goals could be just about anything. Some goals could be to purchase play equipment for the school playground, to increase parent involvement, or to start a new reading program. These are only a few ideas for goals, take your time as a board and make sure your goals are set before school starts in the fall.

Another important task for the summer is to decide what events the PTA will participate in throughout the year. If parental involvement is an issue at your school, then scaling back on the PTA events may be in store for your PTA. This is never something that a PTA wants to do, however, if you do not have enough help to pull off so many PTA sponsored events, then you may need to pick and choose which events you think are going to benefit the school and the children the most. If you have an over-abundance of parental involvement, maybe you can look into increasing the events that the PTA sponsors. This all depends on the situation at your school. Make your choices wisely and don't over extend your PTA or else you will wind up with a bunch of burned out board members at the end of the year. This is the last thing that you want! Once you have drafted your goals and programs for the year, you can build a draft budget.

One of the most important decisions that PTA boards make over the summer is regarding fundraisers. How much money needs to be raised to accomplish your goals? What type of fundraiser is going to help you to raise that amount of money? Do you want to do a traditional selling fundraiser (wrapping paper, candy etc), a collecting fundraiser (collecting cans, box tops etc), a fundraiser that can bring the community together (Jog-A-Thon, Talent Show etc) or solicit direct donations in lieu of various fundraisers? These are all very important questions that need to be discussed by the entire board. It always seems like the school is asking for money these days, so the PTA needs to choose the fundraiser wisely. As we mentioned at the Awards meeting, we urge you to consider going to just one fundraiser a year. You want the fundraiser to be something that the children and the parents can get excited about! Think over all of the options and choose a fundraiser that will be right for your school and your PTA.

Even though the summer is a busy time for the PTA board, remember to have fun while at the board meetings. Bring snacks and don't forget that you are all working to make the school better for your children and all of the other children at the school. Have fun and enjoy all the planning!

Laying the Foundation for a Successful Year

Reaching out to the School Community at the Beginning of the School Year

PTA is a volunteer organization. Without a base of volunteers, our service is limited. There is nothing more frustrating than having great ideas, but too few volunteers to execute them. So how do you go about getting volunteers? Start by reviewing the Volunteer Section of the Fremont Council PTA website, www.fremontcouncilpta.org/volunteers and then plan ways just before and at the beginning of the school year to reach out to and connect with parents and other family members.

Many people don't know what your PTA does. Some have no idea what a PTA is. Start by letting them know through a welcome article in the pre-start of school newsletter. Presidents, introduce yourself, share plans your PTA has for the school year, and let them know ways they can help accomplish your goals plus the value of doing so. In the same newsletter list your programs, how or when people can help with each, and a method for them to sign up to volunteer. Don't forget ways those who can't easily get away from home can help. Those who work often feel they couldn't possibly help, so share how even an hour here or there makes a difference.

Better than promoting your PTA in a written format is doing so in person and the beginning of the school year provides multiple opportunities to do that! Let's start with those adorable little kindergarteners and their excited parents. Most schools have some type of event for incoming kinders and you **NEED** to be there in force! Go buy a bunch of those tri-fold science project boards and put together displays for your programs. (Note: make sure you locate an area to store the display boards for future use.) Ask a FAME or Music for Minors docent to demonstrate what they do. Put together a ½ page introduction to your PTA and make a bunch of copies. Get some coffee to go, water and something to munch on. Set yourself up in a prominent location and start working the crowd. Welcome kinders and their parents as they arrive, answer questions and guide them to where they need to be. These kinder programs usually have a point in which the little ones and parents are separated which gives you the perfect opportunity to mingle, mingle, mingle to show and tell parents about your PTA while they enjoy a beverage and a treat. Engage them first – find about their interests, what they do, etc - before you ask how they'd like to help.

Another great opportunity at an elementary school is when families come to see what class their children will be in. Do something similar to the kinder program in the area where classroom lists are posted. You'll need to have a different twist though, something to keep them at the school instead of checking out the list and leaving. We read about a couple of schools who had a free ice cream social at the time class lists were posted and thought it was a great idea! Help families find grade level listings, offer to help locate classrooms, answer questions about the school and of course, promote your PTA and how they can help your year be successful. Don't forget to ask folks to become a member of your PTA!

Then there is MAZE at the secondary school, THE **BIG** chance and one of the very few times your PTSA will have face time with parents. PTSAs are a mainstay at MAZE, but are you making the most of your time there and how do you keep people from walking past your table and act as though you're invisible? First off, just don't sit there! Yes, you need a person sitting at your table, but 2-3 people need to be up and circulating with parents AND students as they walk by. Let students know how they can get involved with your PTA (and if you don't have ways, think fast **now!**). Tell parents that PTSA still needs them and it really is ok to be on campus even if their kids have said they'll never talk to them again if they do (those with teens with attitudes know that this may not be such a bad thing :). You need to talk quick so develop a concise message to convey why they should be part of your PTSA. Promote parents being in the know by joining your Yahoo Group (YG) even if they don't join the PTSA and then use the YG to disseminate information they need to know such as when progress notices are mailed, report cards are sent home, and changes to the regular schedule. Junior high marks the beginning of no more Friday (or other day) folder and a big drop in communication between the school and parents, a gap that PTSAs can fill via their Yahoo Groups. WHS PTSA's membership has nearly doubled since they began to use their YG in this manner 4-5 years ago! Sorry, got a bit off topic... Some schools give students a checklist of tables they need to visit before they can get the all important class schedule. Make sure a stop at the PTSA table is on that list and if your school doesn't have such a list, ask if PTSA can help get one started.

Incoming/new student orientation is another opportunity. At Parkmont, many of those who led tours of the school after the meeting in the multi-use room were PTA members and believe me; we didn't miss the chance to share what we did as we walked around campus! At junior and senior high, this orientation may be in the spring. Even though students often serve as tour guides, PTSA leaders should be part of the orientation program and available to answer questions. Many parents are apprehensive about their kids starting junior high and high school and appreciate a chance to talk with parents familiar with the school.

(continued on next page)

(continued from previous page)

Many high schools have programs for incoming freshmen which PTSA should be a part of. If you're not currently doing so, ask how you can be part of the event (beyond doing all the work) and then think about what PTSA can offer students that other groups on campus can't. Another opportunity that is overlooked is the event held during which students have a chance to learn about various clubs and groups on campus. Why shouldn't PTSA be there?

During the elementary school years, most parents bring their children to school the first day of school and will park to walk them into campus. PTA should be available to answer questions and help students find their class. Once the school day begins, corral parents to a welcome back reception/coffee/breakfast/tea. Ask that an announcement be made inviting parents to stop by for a cup of coffee before getting on with their day. Mingle, mingle, mingle to show and tell parents about your PTA. Engage them and ask what special interests or talents they may like to share with the school community and how they'd like to help.

Back to School (BTS) night is a mainstay for most PTAs to reach out to the school community, but you could very well be missing a wonderful chance to maximize PTA's exposure that night. Some PTAs hold a BBQ or coordinate a potluck that precedes the actual BTS program during which they promote their PTA. Many parents are rushed to make it to BTS and will appreciate not having to worry about fixing dinner that evening, teachers and staff too! Again, use the same tactics and mingle, mingle, mingle to share what your PTA does, how they can help, and ask them to join your PTA!

A couple more things...

1. PTAs with strong volunteer bases aren't at just one of the listed events, but are at multiple ones.
2. While I state "parents" throughout this article, do not overlook grandparents or other family members.
3. At these events, PTA leaders and chairpersons **cannot** hang out together! People are watching and often quickly decide that PTA is cliquish, a kiss of death for a PTA.
4. To make the most of these opportunities to interface with the school community, communicate with PTA folks the expectations, goals, and message to be delivered well in advance and directly preceding the event.

By Melinda Kufeld

From Council Auditor- Sridevi Ganti



Please note that **year end audit reports (January 1, 2012- June 30, 2012)** are due in summer.

I would like to remind that whether you are the continuing officer or not, the books must be audited prior to the start of next school year. An outgoing auditor must audit books before they are passed on to the incoming treasurer. If you do not have an elected auditor at your unit, please seek help from the community or you may even hire a professional to do the audit. The fee is a legitimate PTA/PTSA expense.

Here are some steps to prepare for the end of the year audit (January 1, 2012 – June 30, 2012) in July.

1. Present Treasurer's report at all monthly meetings
2. All checks written between association meetings must be ratified. This includes association and executive board meetings. Bills presented at meetings are approved and then written. Approval is for checks written at the meetings. Ratification is for checks written between meetings.
3. All checks and deposits (including e deposits like e scrip) must be entered to arrive at monthly checkbook totals.
4. Checkbook monthly balance must match Treasurer's report balance and the reconciled bank statement balance. If the treasurer's report does not cover a calendar month, then, the bank statement should be reconciled with the ledger.
5. Reconcile the bank statements monthly.
6. All deposits and reimbursement forms must be supported by proper documentation (receipts, invoices etc). All checks must have 2 signatures.
7. Cash verification form must be used for deposits and must have all the signatures.
8. Treasurer's report, membership report (up-to-date membership) and any other committee report (fundraising, health and safety etc) must be included in association meeting minutes.
9. Treasurer's binder must include current bylaws, board roster, calendar, adopted budget, association meeting minutes, executive board minutes, Committee reports, monthly bank statements, monthly treasurer reports, last audit report, and copy of taxes filed.



\$\$\$\$\$ Finance Corner \$\$\$\$\$



All 29 units' CT Registrations have been completed and/or submitted! Thank you everyone for your diligence in taking care of this necessary paperwork!

Strongly consider doing the 31-day trial of PTAEZ early this summer. There are many great features that will make more than just the treasurer's life easier. Features include web-based multiple user access, specifically developed for PTA reports, membership tracking, ease of transition to new financial team, consistency, tax form preparation assistance. I'll look into having an information meeting in Fremont in early summer.

Taxes, you know you don't have to wait until the last minute! Once the audit is done, go ahead and get those federal and state tax filings completed. If you have your CT #, the RRF-1 will need to get to the CA Attorney General's office as well.

All PTAs are required to complete and submit in September a year end financial report similar to the one below that recaps the year's finances. This form is also in the toolkit and in the forms section of the Council website. Please contact me if you have any questions.

Thanks for working so hard all year. If you have any questions on these or other topics, please let me know. Kim Mathis, 770-1297, oemexp@att.net



ANNUAL FINANCIAL REPORT (SAMPLE)

FISCAL YEAR _____

Name of Unit _____ IRS EI # _____
Council _____ District PTA _____

BALANCE ON HAND from previous year \$ _____

RECEIPTS

Savings account interest \$ _____
Checking account interest \$ _____
Membership dues (unit portion only) \$ _____
Fundraising (list total gross income individually)
xxx \$ _____
xxx \$ _____
Donations \$ _____
TOTAL \$ _____

RECEIPTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita \$ _____
Founders Day freewill offering \$ _____
TOTAL \$ _____
TOTAL RECEIPTS \$ _____

DISBURSEMENTS (List Budget Categories)

Operating Expenses

Membership Envelopes \$ _____
Insurance Premium \$ _____
Newsletter and Publicity \$ _____
Council/District Leadership Workshops \$ _____
Convention (State/National PTA) \$ _____
Officers' and Chairmen's Reimbursement \$ _____
Past President's Pin \$ _____
Honorary Service Award \$ _____

Program Expenses

Programs and Assemblies \$ _____
Reflections Program \$ _____
Parent Involvement \$ _____
Emergency Preparedness \$ _____
Hospitality \$ _____

Fundraising

Carnival \$ _____
Book Fair \$ _____
Gift Wrap \$ _____

Unallocated Reserves

TOTAL \$ _____

DISBURSEMENTS NOT BELONGING TO UNIT

Council, district, state, and National PTA membership per capita \$ _____
Founders Day freewill offering \$ _____
TOTAL \$ _____

TOTAL DISBURSEMENTS \$ _____

BALANCE ON HAND

\$ _____

Signature _____ Date _____

End of Term Membership Activities



To ensure the best possible new year for your unit, your out-going membership chair should bring the membership procedure book up to date for the incoming membership chairman. Turn over all membership materials and procedure books to next year's membership chair or president. These records should include

- 1) accurate financial accounting of dues sent to council or district, making sure it balances with the final membership counts
- 2) an outline of the year's activities, with an evaluation of the success & learnings of each, as well as your recommendations for following years
- 3) a copy of the membership list, plus any instructions on Just Between Friends or other membership online documents
- 4) a roster of the membership committee, complete with addresses and telephone numbers.
- 5) any membership resources, such as forms, posters, letters, etc. (helpful to send electronic versions)

Summer Activities for Incoming Membership Chair

Membership activities begin even before your school year begins! Therefore it is beneficial for the membership committee to meet before the beginning of the school year to establish the membership goals, design the membership and outreach promotion, and plan yearlong duties and activities. The membership plan must be approved by the executive board.

Most units are invited to be part of their school summer registration packet and/or Maze Day registration. Prior to the school office closing for the year, gather information on due dates for inclusion in the summer packet and summer contact information for the person in charge of the packet. Some schools prefer to receive your welcome letter and forms before the end of June. Create a "message from the president" invitation letter that includes information about the membership campaign, accomplishments of your PTA, the benefits of membership, and how to join. Include your membership form and dues information. Enlist some volunteers to ensure you have good coverage at your Maze Day &/or Welcome Back table.

Be prepared for your school's Maze Day/Welcome Back! Create and display membership posters or display boards which promote your theme and provide information about PTA's goals, purpose and activities. Highlight how PTA supports your school and community. Include photos or graphics of past activities. Visit National PTA's website, www.pta.org or the California PTA website, www.capta.org, for membership marketing tools and ideas.

Have extra membership forms & envelopes available at your table, even if you sent them ahead in the summer packet. Create a Welcome Packet to distribute to new members. This could include a calendar of the meeting dates, description of PTA programs and projects, website and contact information. Have membership forms and packets available in the school office for late registrants and families who join the school community at other times during the school year.

Contact Leslie Gupta for more information.

lk Gupta@comcast.net

(510) 818-9551

Fremont Council Mission Statement

Our Mission is to advocate for all the children and youth of Fremont Unified School District. Fremont Council PTA will support each of our PTA/PTSA units through timely communication, training, leadership, and guidance. We will assist units through disseminating information, conducting meaningful meetings, providing PTA resources, and being a platform for sharing ideas and programs between units. Fremont Council PTA will serve our community through education, collaboration, resource services, and community wide programs.

2011/12 Goals

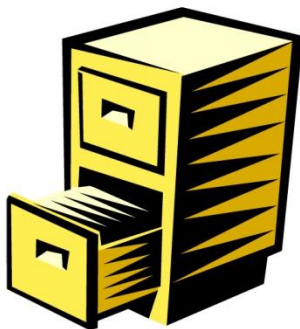
1. Improve communication from council to units
2. Increase skills/knowledge through training
3. Create opportunities for collaboration amongst units

Records Retention Schedule

It is very important that certain PTA records be retained. Listed are items that must be reviewed on a periodic basis and kept in a safe place. Develop a records retention policy based on this list.

PERMANENT STORAGE

- ❑ Annual audit reports
- ❑ Articles of Incorporation
- ❑ Canceled checks, for important transactions (e.g., taxes, contracts)
- ❑ Checks should be filed with papers pertaining to the transaction
- ❑ Corporation reports filed with the Secretary of State
- ❑ Legal correspondence
- ❑ Group exemption documents
- ❑ Insurance records:
 - Accident reports
 - Claims
 - Policies
- ❑ Ledgers
- ❑ Minutes of executive board, association and committees (bound)
- ❑ PTA Charter
- ❑ Tax documents:
 - Exempt status
 - Group exemption
 - Letter assigning IRS Employer Identification Number (EIN)
 - State and federal tax forms, as filed
- ❑ Correspondence with state or federal agencies
- ❑ Trademark registrations



Think about getting a file cabinet at your school site so that PTA officers don't misplace these items at home or move away with them

10 YEARS

- ❑ Financial statements (year-end) and budgets
- ❑ Grant award letters of agreement

7 YEARS

- ❑ Payment authorization and expense forms
- ❑ (receipts attached) for payments to vendors or reimbursement to officers
- ❑ Cash receipt records
- ❑ Checks (other than those listed for permanent retention)
- ❑ Expired contracts and leases
- ❑ Insurance incident reports
- ❑ Invoices
- ❑ Purchase orders
- ❑ Sales records

3 YEARS

- ❑ General correspondence
- ❑ Employee records (post-termination)
- ❑ Employment applications

1 YEAR

- ❑ Bank reconciliations
- ❑ Correspondence with vendors if non-contested
- ❑ Duplicate deposit slips
- ❑ Current Bylaws, approved by state parliamentarian
- ❑ Standing Rules
- ❑ Certificates of Insurance
- ❑ Inventories of products and materials, updated yearly